



## Corporate Training Materials

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# Preface

## What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

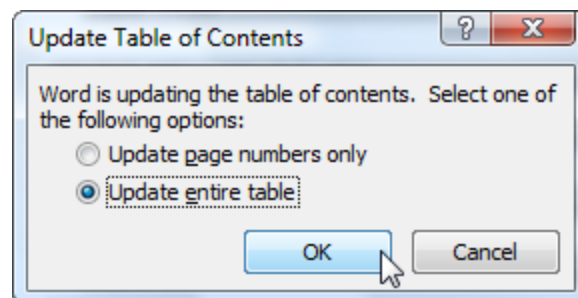
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

## How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

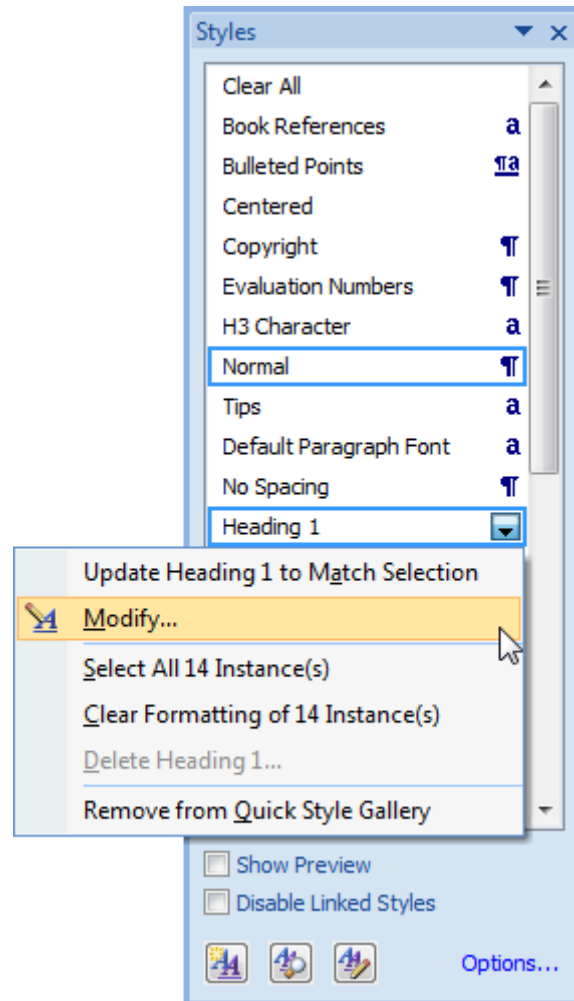


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

## Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

## Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
  - Use examples, case studies, and stories that are relevant to the group.
  - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
  - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

## **Icebreakers**

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

## **Icebreaker: Friends Indeed**

### **Purpose**

Have the participants moving around and help to make introductions to each other.

### **Materials Required**

- Name card for each person
- Markers

### **Preparation**

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

### **Activity**

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

## **Instructor Guide Sample**

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*Continuity gives us roots; change gives us branches, letting us stretch and grow and reach new heights.*

***Pauline R. Kezer***

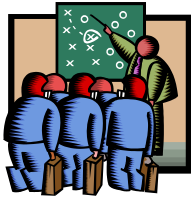
## **Sample Module: Preparing for Change**



A simple definition of change is “to cause to be different”. The idea of change management on a personal level has been studied for more than one hundred years. But it is only since the mid- 1980’s that change management has been explored within the context of business applications.

Today’s change management initiatives have become a business discipline, driving bottom-line results through changes in systems and behaviors. Managing change has therefore become a critical skill, both for leadership -- and for workers in an organization.

## Defining Your Strategy



It is critical to manage change by creating and implementing a strategy that defines an approach consistent with the unique needs of the organization. The strategy serves as the guiding framework, providing direction and shaping decision making throughout the change process.

A simple way to gather data for the strategy is to set up interviews and ask questions regarding the different aspects of the change. Below are some typical questions:

Aspect	Question
<b>The Situation</b>	What is being changed? How much perceived need for the change exists? What groups will be impacted? How long will the change take?
<b>People and Their Roles</b>	Who will serve as a high-level sponsor? What functional groups should be represented to lead the effort?
<b>Issues for Analysis</b>	What will happen if we do/don't do this? How universal is the change? Are there exceptions or deviations to consider?

From the answers to the questions, the strategy document is created, serving as a “blueprint” for the initiative. A strategy document should discuss important components of the change. The components are listed below, accompanied by sample wording.

Strategy Component	Sample Language/Notes
<b>Description of the proposed change vision, and its goals</b>	Transform the business processes and the technology by which the organization manages the human resources and payroll functions
<b>The reasons(s) why the change is necessary</b>	These changes will allow the organization to save time and money and provide more responsive HR and payroll services to our employees
<b>Critical success measures and key performance indicators</b>	<p>Risks have been proactively identified and addressed</p> <p>Employees are prepared to perform their new job on Go live day with a 95% success ratio</p>
<b>Project stakeholders and stakeholder groups and their involvement</b>	<p>The current Phase: Senior management</p> <p>The Pre-Implementation Phase: Senior management, subject matter experts, change champions</p>
<b>Key messages to communicate</b>	Pre-Implementation Phase: The business requirements, business case staffing, and the projected timeline
<b>Roles and Responsibilities</b>	<p>Communications Team Lead: Develop project communications and presentations</p> <p>Change Management Team Lead: Direct overall team activities; Provide team with change management expertise; Manage Project Team Effectiveness, Capability Transfer, &amp; Leadership Alignment activities</p>
<b>Target time frame to achieve goals</b>	(This can be a graphical time line, a paragraph, an embedded spreadsheet, etc.)
<b>Focus Areas</b>	<p>Leadership Alignment: Align leaders to the project vision and enable them to champion the effort</p> <p>Organizational transition: Design new employee roles, jobs, and organization structures to support the new processes and technology</p>

<b>Estimated Time</b>	15 minutes
<b>Topic Objective</b>	To use a hypothetical case study to create questions for a change strategy
<b>Topic Summary</b>	<p>Contemporary Chemical</p> <p>This exercise provides participants with practice developing key questions that need to be answered in order to gather data necessary for developing a change management strategy</p>
<b>Materials Required</b>	None
<b>Planning Checklist</b>	Handout: Contemporary Chemical Phase I
<b>Recommended Activity</b>	<p>Divide participants into groups of 4 and distribute the handout. It contains a short case about a company about to undergo a change.</p> <p>Ask participants to read the case and develop questions that need to be asked in order to create a strategy. The questions should be written on flip chart paper and posted for discussion during debrief.</p> <p>In the debrief discussion, look for common question themes among the groups, and emphasize the importance of gathering all the needed data about the situation, the people, and the issues aspects of the organization and the potential change.</p>
<b>Review Questions</b>	Why are a complete and comprehensive strategy and strategy document important to the success of a change management project?

## Building the Team

To effectively implement a team positioned for success, leaders must select members who display a high degree of skill in six key elements:

1. Commitment
2. Contribution
3. Communication
4. Cooperation
5. Conflict management
6. Connection



The team must represent all of the needed functional groups and roles necessary to manage the change initiative. By formalizing the team and providing funding and other resources, it sends a message of accountability and responsibility, and illustrates the investment the organization has made in the change.

<b>Estimated Time</b>	20 minutes
<b>Topic Objective</b>	To define six elements of a successful change management team
<b>Topic Summary</b>	Teams and Roles in Change Management  People responsible for putting together a change management team should carefully consider the six elements when selecting individuals for the team
<b>Materials Required</b>	Handout: Elements of a High Performing Change Management Team  Handout: Essentials Roles for a Change Management Team  Worksheet: Change Management Team Job Description
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	Distribute the two handouts and the worksheet to everyone  Discuss the six elements and overview the roles that should be represented  Divide the group into teams of 4  Ask the groups to use the worksheet to write a short job description for a team member in the change management role  In debrief, ask each group to share one or two requirements from their job description

<b>Review Questions</b>	<p>What are the benefits of careful and balanced selection of change management team members?</p> <p>The problems of not considering the right skills and attributes?</p> <p>Remind participants to consider adding an item to their action plan.</p>
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Below is an optional team-building exercise you can use if time permits.

<b>Estimated Time</b>	10 minutes
<b>Topic Objective</b>	To create a group resume
<b>Topic Summary</b>	Creating a resume is an excellent way to help a newly formed change management team discover how rich the group is in skills and experiences
<b>Materials Required</b>	None
<b>Planning Checklist</b>	None
<b>Recommended Activity</b>	<p>Divide participants into groups of 3 and provide each with flipchart paper and markers</p> <p>Tell the group members that they represent an incredible array of talents and experiences</p> <p>Suggest that one way to learn about one another is to compile a group resume</p> <p>Ask the groups to use flipchart paper to each write a resume that includes</p> <ul style="list-style-type: none"> <li>• Total years of professional experience</li> <li>• Positions held</li> <li>• Key accomplishments</li> <li>• Knowledge about the change management topic</li> <li>• Educational background</li> <li>• Hobbies</li> </ul> <p>In debrief, ask each group to present their resume to the large group.</p>

<b>Review Questions</b>	Remind participants to consider adding an item to their action plan.
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## **Case Study**

James needed to prepare for a change in management at a paper distribution company. In order to do so, he assembled a very specific team of competent employees. They were chosen based on factors such as commitment, communication, and conflict management. They were able to effectively design a strategy for the change and guide it onward to completion, which helped the company grow and evolve.



## Module Two: Review Questions

- 1) Change management has been explored within the context of business applications:
  - a) For more than hundred years
  - b) For more than fifty years
  - c) Since mid-1980's
  - d) Since mid-1990's
- 2) A simple definition of change is:
  - a) To cause to be different
  - b) To prove that you are different
  - c) To want to be different
  - d) To try to be different
- 3) What kind of questions should you ask when you are gathering data for a change strategy?
  - a) General questions
  - b) Questions about anything regarding the organization
  - c) Any kind of questions regarding the interviewee
  - d) Only the questions regarding the change
- 4) When the strategy document is created, it serves as:
  - a) Black print for the initiative
  - b) Whiteprint for the initiative
  - c) Blueprint for the initiative
  - d) Red print for the initiative
- 5) Which of the following is not one of the key elements for the members of a team?
  - a) Contribution
  - b) Connection
  - c) Commitment
  - d) Competitiveness
- 6) Which of the following statements IS NOT true?
  - a) The team must represent all of the needed functional groups and roles necessary to manage the change initiative
  - b) By formalizing the team and providing funding and other resources, it sends a message of accountability and responsibility
  - c) Leaders must select members who display a basic degree of skill in six key elements
  - d) All the statements are true

## **Activities**

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.

## **Sample Worksheet: Reflecting on a Past Change**

Think back to a time when a major change effort occurred in your organization or group. Write brief answers to the questions below.

**What was the change?**

**What preceded it?**

**What happened when the change occurred?**

**How did people react to it?**

**Was it successful?**

## **Quick Reference Sheets**

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

# Change Management

## Building the Team

To effectively implement a team positioned for success, leaders must select members who display a high degree of skill in six key elements: Commitment, contribution, communication, cooperation, conflict management, and connection.

The team must represent all of the needed functional groups and roles necessary to manage the change initiative. By formalizing the team and providing funding and other resources, it sends a message of accountability and responsibility, and illustrates the investment the organization has made in the change.

## Building Support

Effective communications are essential for building support throughout the organization.

### EFFECTIVE COMMUNICATIONS

Whoever communicates with people impacted by a change must have a clear understanding of the overall nature of the change, its reasons, and how it aligns with the vision for the organization. He or she must understand the risks of not changing, the timing for the change, and what people will be most impacted by the change.

Communications options are many, including email, presentations, postings on the organization's intranet, flyers and circulars, banners, online or phone conferences, and special social events.

Beforehand, communicators should identify and segment audience groups, craft messages appropriate for each audience, and determine the most effective packaging, timing, and methods for communicating.

## Plenty of Facts

A fact is something that is demonstrated to exist, or known to have existed. As opposed to the "people" component, emotion, facts are straightforward, and necessary to measure progress. As a change management project shifts into the launch or in-process stage, the change management team must make sure that measurement is ongoing. Two types of measurements are described below.

- **Audits and performance measurement systems:** Audits and measurement systems provide data to determine the adoption rate of change. They help to determine:
- **Accountability Systems:** Enhancements should be made to performance evaluation and compensation systems in order to maintain the accountability and credibility of the change. This is important in order to maintain ongoing reinforcement of the changed systems or processes.

## **Certificate of Completion**

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

# CERTIFICATE OF COMPLETION

**[Name]**

*Has mastered the course*

*Change Management*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_

## **PowerPoint Sample**

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.



## Module Two: Preparing for Change

Today's change management initiatives have become a business discipline, driving bottom-line results through changes in systems and behaviors. Managing change has therefore become a critical skill, both for leadership -- and for workers in an organization.

*Continuity gives us roots; change gives us branches, letting us stretch and grow and reach new heights.*

**Pauline R. Kezer**



## Defining Your Strategy

What is being changed?

Who will serve as a high-level sponsor?

What will happen if we do/don't do this?

## Building the Team

Commitment

Contribution

Communication

Cooperation

Conflict  
management

Connection

## Module Two: Review Questions

- 1) Change management has been explored within the context of business applications:
  - a) For more than hundred years
  - b) For more than fifty years
  - c) Since mid-1980's
  - d) Since mid-1990's
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  - b) To prove that you are different
  - c) To want to be different
  - d) To try to be different

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